Polski Instytut Ekonomiczny

Warsaw, December 19, 2025 r.

The Digital Decade objectives should focus on strengthening the EU's technological sovereignty

Growing pressure to strengthen Europe's technological and digital sovereignty requires appropriate adjustments to national and EU policies. In the report *"Reforming the Digital Decade – how to incorporate technological sovereignty into the EU's key digital strategy?"*, the Polish Economic Institute (PIE) presents a set of recommendations aimed at adapting the EU's digital transformation programme to 2030, *"The Path to the Digital Decade"*, to evolving challenges in this area. Key priorities include integrating the objectives and indicators of the Digital Decade with the goals of EU industrial policy, focusing on reducing dependencies in critical areas, developing detailed solutions for public services—especially in healthcare—and fostering digital skills that support supplier diversification.

More effective measurement of digital sovereignty

Technological sovereignty is increasingly becoming a central concept in EU industrial policy, with political declarations more frequently translating into concrete action. Digital sovereignty is an element of technological sovereignty, and the authors of the PIE report propose incorporating appropriate metrics into the updated Digital Decade strategy. To this end, they use the concept of the technology stack, which describes interdependencies between providers of core products, services, infrastructure, and applications. This approach makes it possible to assess the level of dependence on non-European suppliers and to monitor the effects of policy measures.

"Technological sovereignty is currently one of the key themes in discussions on EU industrial policy and security. According to the 2024 Draghi report, as much as 80% of the EU cloud computing market is served by non-European companies, while in the case of mobile devices this figure is almost 100%. The EU's share of the global semiconductor market is currently estimated at 10.5%, whereas the European Commission has set a target of increasing it to 20%. However, there are no widely accepted measures of digital sovereignty. We believe that the technology stack concept, combined with market data and indicators measuring import concentration, can help continuously estimate sovereignty in individual product segments and monitor the growth of Europe's share at each layer of the stack," says Jakub Witczak, analyst in the Digital Economy Team in Polish Economic Institute.

The technology stack concept may also be applied to assessing Poland's level of technological sovereignty, which receives significant attention in the currently developed

National Digitalisation Strategy and sectoral strategies (including semiconductors and artificial intelligence), aimed at building domestic production capacities.

Digital public services in healthcare

EU targets for the development of digital public services have already been achieved at a level exceeding 80%. PIE proposes setting future objectives that would simultaneously support the development of public services and the growth of technological independence, while also focusing on specific aspects of digital transformation—for example, healthcare.

"One of the areas where digital public services are developing most rapidly is healthcare. Introducing a methodology for assessing the level of sovereignty of cloud infrastructure in healthcare could be a step towards stronger oversight of data stored in healthcare systems and increased technological independence in this area. Moreover, medical data can be used through digital tools to strengthen prevention and reduce healthcare costs," emphasizes Ignacy Święcicki, Head of the Digital Economy Team in Polish Economic Institute.

Digital skills of firms and citizens

One of the goals of the Digital Decade is to increase digital skills among citizens. PIE, drawing on other studies, highlights that market leaders in the digital sector—most often originating from outside Europe—also play a dominant role in training and certification. A counterbalance to this situation would be support for certification related to open-source systems through a public funding scheme for certified courses offered in schools, universities, and public administration.

In the area of business digital transformation, strengthening the innovativeness of European companies and gradually narrowing the gap between the EU, the United States, and China is particularly important. The "Digital Decade" programme measures EU innovation growth by the number of technological "unicorns" created in the EU—that is, start-ups valued at over PLN 1 billion.

The Polish Economic Institute proposes that, beyond the nominal increase in the number of such companies, the attractiveness of the European market for innovative firms should also be assessed. The unicorn indicator could be replaced by the share of start-ups that have achieved an exit in the European market—either through an IPO in Europe or acquisition by an entity with European capital. This shift in perspective would help focus on measures that strengthen incentives to retain innovative ideas in Europe, while also linking the Digital Decade with other EU strategies, such as the development of the Savings and Investments Union.

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